

Inclarity Partner Training

Moves, Adds, Changes, Deletes (MACDs) v5 25/06/2014

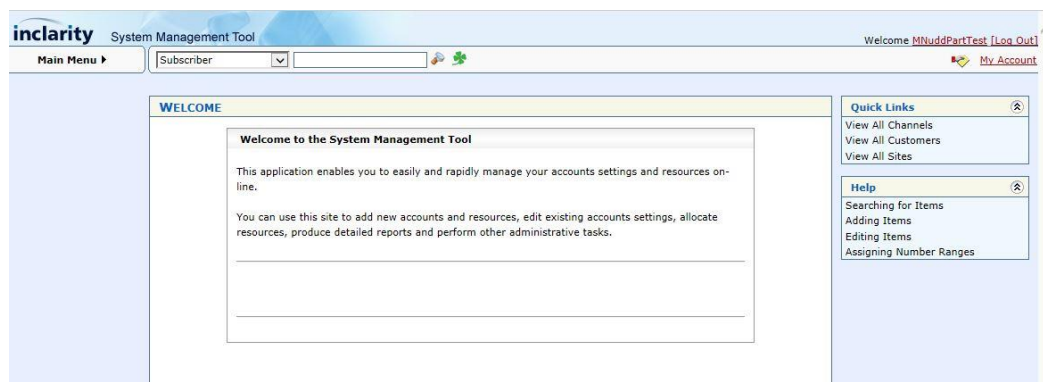
Many tasks concerning the configuration of end user VoIP services can be processed by the Inclarity partner using the superior SMT login provided for this purpose. This document walks through some of the most commonly recurring tasks and can be used as a reference point.

Contents

1. Partner SMT Login & Navigation	2
2. Change Subscriber Password	5
3. Change Subscriber Name	6
4. Change Subscriber CLI	7
5. Add/Remove Terminal (Desk Phone)	9
6. Add/Remove Terminal (Soft Phone)	12
7. Add/Edit/Remove UC Client	14
8. Add/Edit/Remove Voice Mail	16
9. Add/Edit/Remove Follow Me	17
10. Add/Edit/Remove Hunt Group	20
11. Add/Edit/Remove Auto Attendant	24
12. Add/Edit/Remove Receptionist Client	28
13. Add/Edit/Remove ACD (Call Centre) Group	33
14. Add/Edit/Remove Pickup Group	39
15. Add/Edit/Remove Hot Desking	41
16. Block Selected Outgoing Calls	43

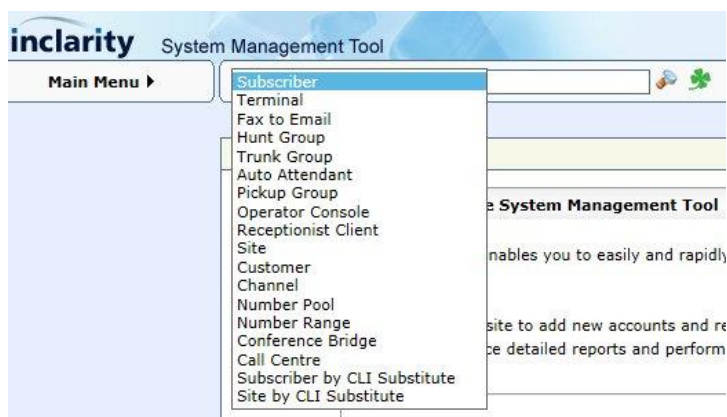
1. Partner SMT Login & Navigation

To manage the services of your customers you will need to log into SMT online. The default URL is <https://smt.inclarity.co.uk> – if you have been offered your own branded version then please use that address instead.



From this initial dashboard you can search or browse to any Channel, Customer, Site or Subscriber underneath you.

To search simply open the drop-down in the top toolbar to select the relevant object, enter the relevant search criteria and press the Find button.

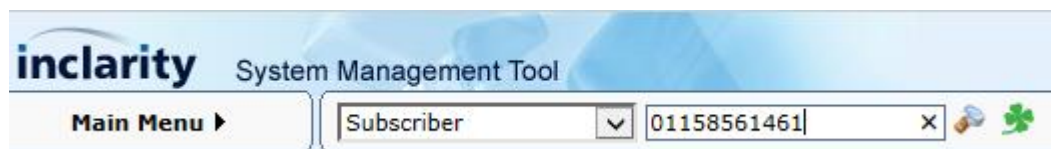


Alternatively, you can use the Quick Links on the right-hand side to drill down to different levels.



If you should have any difficulties with your login, or you should require any assistance beyond that described below then please contact Inclarity Customer Services.

To Find a Subscriber enter the user's number into the search bar:



Press the **Find** button. Any matches will display in the table below.

SEARCH RESULTS

FIND SUBSCRIBER: [01158561461]

Enable Delete
Click on the subscriber ID to edit.

ID	First Name	Last Name	Status	Number	Extension	Email	Creation Date
sub:00114902	Adam	Apple	Active	+44 (0) 115 8561461	461	email@example.com	29/12/2014 09:53:12

Select the relevant Subscriber **ID** to access that Subscriber's settings.

EDIT SUBSCRIBER [SUB:00114902 ADAM APPLE] - GENERAL DETAILS

[Inclarity Test Partner](#) / [Inclarity Test Direct Sales](#) / [Mike Nudd Demo](#) / [Mike Nudd test site](#) / [Adam Apple](#)



Number: +44(0)1158561461
 Extension: 461
 First Name:
 Last Name:
 Email Address:
 Mobile:
 Password (numeric): [Password Set] [Change Password](#)
 Activation Status: [Enabled]

To find a Site you can search for the Site Name using the Find tool.

To add, edit or remove a Hunt Group you must first search for the relevant Site in SMT by its name:

inclarity System Management Tool

[Main Menu](#) ▶

Site  

Any matches will display in the table below.

SEARCH RESULTS

FIND SITE: [MIKE NUDD]

Click on the site ID to edit.

ID	Name	Alias	Status		Customer	Partner		
site:35066	Mike Nudd test site	123456	Active	[Show Subscribers]	Mike Nudd Demo	Inclarity Test Partner	Add Subscriber	Export Subscriber Data
site:39726	Mike Nudd test site 2	123456	Active	[Show Subscribers]	Mike Nudd Demo	Inclarity Test Partner	Add Subscriber	Export Subscriber Data
site:21266	Mike Nudd Trial BW	123456	Active	[Show Subscribers]	Mike Nudd Test BW	Inclarity Test Partner	Add Subscriber	Export Subscriber Data

Click on the correct Site to view its settings.

inclarity System Management Tool Welcome MNuddPartTest [\[Log Out\]](#)

Main Menu ▾ [My Account](#)

General

- General Details
- Address
- Contacts
- Locale
- Notes [0]

Monitoring

- Network Probes

Services

- Phone Line
- Fax To Email
- Voice Mail
- Music On Hold
- Call Management
- Hunt Groups
- Trunk Groups
- Pickup Groups
- Receptionist Clients
- Call Centres
- Hot Desks
- Akixi Wallboards
- Call Limiter

EDIT SITE [SITE:35066 MIKE NUDD TEST SITE] - GENERAL DETAILS

[Inclarity Test Partner](#) / [Inclarity Test Direct Sales](#) / [Mike Nudd Demo](#) / [Mike Nudd test site](#)

Name:	<input type="text" value="Mike Nudd test site"/>
Activation Status:	[Enabled]
Site Type:	Centrex
Alias:	123456

Site Options ⌵

- Change Activation Status
- Show Subscribers
- Show Number Ranges
- Export Subscriber Data

Add ⌵

- Add Note
- Add Subscriber
- Add Pickup Group
- Add Trunk Group
- Add Akixi Wallboard

2. Change Subscriber Password

Every Subscriber will have a password to control his or her access to the Phone Manager web portal. This same password is used for his or voicemail access, TAPI driver, UC Client and Bria for PC soft phone (if used).

If a user cannot remember his or her password or is locked out due to the use of the wrong password the password can be reset by the Administrator from SMT. (The password reset also automatically unlocks the service for the user.)

To change a Subscriber's password you must first search for and open the Subscriber in SMT.

General	EDIT SUBSCRIBER [SUB:00114902 ADAM APPLE] - GENERAL DETAILS
<ul style="list-style-type: none"> General Details Address Locale Notes [0] 	<p>Inclarity Test Partner / Inclarity Test Direct Sales / Mike Nudd Demo / Mike Nudd test site / Adam Apple</p> <p>Number: +44(0)1158561461</p> <p>Extension: 461</p> <p>First Name: <input type="text" value="Adam"/></p> <p>Last Name: <input type="text" value="Apple"/></p> <p>Email Address: <input type="text" value="email@example.com"/></p> <p>Mobile: <input type="text" value="07123456890"/></p> <p>Password (numeric): [Password Set] Change Password</p> <p>Activation Status: [Enabled]</p> <p style="text-align: right;"><input type="button" value="Save"/></p>
<ul style="list-style-type: none"> Services Phone Line Terminals Fax To Email Voice Mail Conference Bridge Music On Hold Call Management Hunt Groups Pickup Groups 	

On the Subscriber screen you will see a link in the centre to **Change Password** – click on this.

Password:

Confirm Password:

Enter a new password into both boxes and then press **OK**.

Also then make sure you press the **Save** button to save your changes to the system.

3. Change Subscriber Name

Every user has a name that is copied to the online Broadsoft contact directory, and which will be shown as the SIP Display Name in the user's outgoing calls to other VoIP users. If ownership of the Broadsoft Extension number changes then the user's name should be updated.

To change a Subscriber's name you must first search for and open the Subscriber in SMT.

General	EDIT SUBSCRIBER [SUB:00114902 ADAM APPLE] - GENERAL DETAILS
General Details	Inclarity Test Partner / Inclarity Test Direct Sales / Mike Nudd Demo / Mike Nudd test site / Adam Apple
Address	
Locale	Number: +44(0)1158561461
Notes [0]	Extension: 461
	First Name: <input type="text" value="Adam"/>
	Last Name: <input type="text" value="Apple"/>
	Email Address: <input type="text" value="email@example.com"/>
	Mobile: <input type="text" value="07123456890"/>
	Password (numeric): [Password Set] Change Password
	Activation Status: [Enabled]
	<input type="button" value="Save"/>

On the Subscriber screen you will see fields for the user's **First Name** and **Last Name**. Simply update these fields with the new user's name and then press the **Save** button to save your changes to the system.

Note that the new user's phone will only begin to use the new Subscriber name as the SIP Display Name once it has been rebooted.

4. Change Subscriber CLI

By default a Subscriber on the Inclarity platform will show their own personal DDI number as the caller line identifier (CLI) on their outgoing calls. In some cases however, a user may prefer to show a different number – e.g. the main telephone number for their team or their office. It is possible to change this behaviour in SMT.

To change a Subscriber's CLI you must first search for and open the Subscriber in SMT.

EDIT SUBSCRIBER [SUB:00114902 ADAM APPLE] - GENERAL DETAILS

[Inclarity Test Partner](#) / [Inclarity Test Direct Sales](#) / [Mike Nudd Demo](#) / [Mike Nudd test site](#) / [Adam Apple](#)

Number: +44(0)1158561461
 Extension: 461
 First Name: Adam
 Last Name: Apple
 Email Address: email@example.com
 Mobile: 07123456890
 Password (numeric): [Password Set] [Change Password](#)
 Activation Status: [Enabled]

From the Services menu on the left select Phone Line.

EDIT SUBSCRIBER [SUB:00114902 AMY APRICOT] - PHONE LINE

[Inclarity Test Partner](#) / [Inclarity Test Direct Sales](#) / [Mike Nudd Demo](#) / [Mike Nudd test site](#) / [Amy Apricot](#)

Call Waiting:

Divert Calls:

Group Pickup:

Hold:

Incoming Calls:

Incoming Calls CLI Presentation:

Outgoing Calls:

Outgoing Calls CLI Presentation:

Pickup Calls:

Three Way Conferencing:

Transfer Calls:

Single Step Transfer:

Ring On Hold Call:

Park Calls:

Retrieve Calls:

Lock Line:

Unlock Line:

Call Restriction
 [No prefixes defined]

CLI Substitute Activation:

CLI Substitute Number: --- Not Selected ---

The CLI Substitute fields are inactive and locked (greyed out) by default. You can however access each setting by pressing the Unlock button. Tick the box next to CLI Substitute Activation and then use the CLI Substitute Number drop-down box to select the preferred telephone number to be used for CLI.

CLI Substitute Activation:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
CLI Substitute Number:	<input type="checkbox"/>	<input type="checkbox"/>	<div style="border: 1px solid black; padding: 5px;"> <p>--- Not Selected ---</p> <p>=== site:35066 - Mike Nudd test site ===</p> <p>+44(0)1158561460</p> <p>+44(0)1158561461</p> <p>+44(0)1158561462</p> <p>+44(0)1158561463</p> <p>+44(0)1158561464</p> </div>
			<input type="button" value="Save"/>

Choose the relevant telephone number and then press to complete.

Note that you if wish to change the CLI for all of the Subscribers on the same Site, you can do this at Site level, rather than for every Subscriber one at a time, to save you some time. To do so first find the Site:

The screenshot shows the 'inclarity System Management Tool' interface. The main menu is set to 'Subscriber'. The page title is 'EDIT SITE [SITE:35066 MIKE NUDD TEST SITE] - GENERAL DETAILS'. The breadcrumb trail is 'Inclarity Test Partner / Inclarity Test Direct Sales / Mike Nudd Demo / Mike Nudd test site'. The form fields are:

- Name: Mike Nudd test site
- Activation Status: [Enabled]
- Site Type: Centrex
- Alias: 123456

There is a 'Save' button at the bottom right of the form. On the left, there is a navigation menu with sections: General, Monitoring, and Services. The 'Services' section is expanded, showing options like Phone Line, Fax To Email, Voice Mail, etc. On the right, there are 'Site Options' and 'Add' sections.

From the Services menu on the left select Phone Line.

CLI Substitute Activation:	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
CLI Substitute Number:	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<div style="border: 1px solid black; padding: 5px;"> <p>--- Not Selected ---</p> </div>
			<input type="button" value="Save"/>

The settings here are similar to those already described above, except that changes here will impact on all underlying Subscribers (that have not opted out of the default with their own CLI settings).

IMPORTANT

Note that you cannot select a 3rd party number from the CLI Substitution drop-down box. If you would like to use a 3rd party telephone number for CLI then please contact Inclarity Customer Services.

5. Add/Remove Terminal (Desk Phone)

A Subscriber cannot make telephone calls without a Terminal – a telephone of some kind.

To view the Terminals associated with a Subscriber you must first search for and open the Subscriber in SMT.

From the Services menu on the left select **Terminals**.

Name	Type	MAC Address	Serial	Port	Protocol	Featureset	Term ID
SPA942	Linksys - SPA942	000E083CE52C			SIP	Voice	
Bria_PC	Bria - for PCs				SIP	Voice	

Any existing Terminals will show in the list. To add a new IP desk phone choose Add Terminal from the box on the right hand side.

Note that if you add more than one Terminal (desk phone or soft phone) to the list, then you will be billed for the user as a Multi-Terminal Subscriber.

When adding a new desk phone Terminal you will be prompted to give the new device a **Friendly Name** and confirm its **Mac Address**:

After entering these details click on **Set Mac Address**, and you will be asked to choose the make and model of the device from a drop-down box.

EDIT SUBSCRIBER [SUB:00114902 ADAM APPLE] -

[Inclarity Test Partner](#) / [Inclarity Test Direct Sales](#) / [Mike Nudd Demo](#) / [Mike Nudd test site](#) / [Adam Apple](#)

Name: PolycomV VX300
 MAC Address: CBACBACBACBA
 Terminal Type: [Set Terminal Type](#)

Cisco - SPA525
 Gigaset - N3xx
 Gigaset - N5xx
 Grandstream - HT502
 LG-Ericsson - IP8802
 LG-Ericsson - IP8815E
 LG-Ericsson - IP8820
 LG-Ericsson - IP8820E
 LG-Ericsson - IP8830
 Linksys - SPA2102
 Linksys - SPA921
 Linksys - SPA922
 Linksys - SPA941
 Linksys - SPA942
 Panasonic - KX-TGP500
 Polycom - 321
 Polycom - 331
 Polycom - 335
 Polycom - 450
 Polycom - 5000
 Polycom - 6000
 Polycom - 650
 Polycom - 7000
 Polycom - VVX300
 Polycom - VVX310
 Polycom - VVX400
 Polycom - VVX410
 Polycom - VVX500
 Polycom - VVX600
 Snom - M9

Make the relevant selection and press **Set Terminal Type**. (Note that if your device does not appear in this list, then it is not supported by Inclarity.) You will see a final screen similar to the below.

EDIT SUBSCRIBER [SUB:00114902 ADAM APPLE] -

[Inclarity Test Partner](#) / [Inclarity Test Direct Sales](#) / [Mike Nudd Demo](#) / [Mike Nudd test site](#) / [Adam Apple](#)

Name: PolycomV VX300
 MAC Address: CBACBACBACBA
 Terminal Type:
 Version:
 Serial Number:
 Port:
 Protocol:
 IP Mask: [\[Review Allowed Range\]](#)
 Featureset:
 TimeZone:
 Transport Protocol:

The only configurable setting is the **Featureset**, which actually specifies the codec priority of the device:

- **Voice:** G729 (basic quality, low bandwidth)
- **New Voice:** G711 (high quality, high bandwidth)
- **HD Voice:** G722 (HD quality, very high bandwidth)



By default you should select **New Voice**. When you are ready press **Save** to add the Terminal to the Subscriber.

To remove a Terminal return to the Terminal list and tick the box Enable Delete at the top.

EDIT SUBSCRIBER [SUB:00114902 ADAM APPLE] - TERMINALS

[Inclarity Test Partner](#) / [Inclarity Test Direct Sales](#) / [Mike Nudd Demo](#) / [Mike Nudd test site](#) / [Adam Apple](#)

Enable Delete



	Name	Type	MAC Address	Serial	Port	Protocol	Featureset	Term ID	
	SPA942	Linksys - SPA942	000E083CE52C			SIP	Voice		
	Bria PC	Bria - for PCs				SIP	Voice		Delete

Note that a Delete option will only appear against unused/offline Terminals. You can however force a switch of Terminals by clicking on the grey icon next to one of the other entries.

EDIT SUBSCRIBER [SUB:00114902 ADAM APPLE] - TERMINALS

[Inclarity Test Partner](#) / [Inclarity Test Direct Sales](#) / [Mike Nudd Demo](#) / [Mike Nudd test site](#) / [Adam Apple](#)

Enable Delete

	Name	Type	MAC Address	Serial	Port	Protocol	Featureset	Term ID	
	SPA942	Linksys - SPA942	000E083CE52C			SIP	Voice		Delete
	Bria PC	Bria - for PCs				SIP	Voice		

Press **Delete** to remove the unwanted Terminal and then press **Save** to remove it permanently from the list.

6. Add/Remove Terminal (Soft Phone)

A Subscriber cannot make telephone calls without a Terminal – a telephone of some kind.

To view the Terminals associated with a Subscriber you must first search for and open the Subscriber in SMT.

EDIT SUBSCRIBER [SUB:00114902 ADAM APPLE] - GENERAL DETAILS

[Inclarity Test Partner](#) / [Inclarity Test Direct Sales](#) / [Mike Nudd Demo](#) / [Mike Nudd test site](#) / [Adam Apple](#)

Number: +44(0)1158561461
 Extension: 461
 First Name: Adam
 Last Name: Apple
 Email Address: email@example.com
 Mobile: 07123456890
 Password (numeric): [Password Set] [Change Password](#)
 Activation Status: [Enabled]

From the Services menu on the left select **Terminals**.

EDIT SUBSCRIBER [SUB:00114902 ADAM APPLE] - TERMINALS

[Inclarity Test Partner](#) / [Inclarity Test Direct Sales](#) / [Mike Nudd Demo](#) / [Mike Nudd test site](#) / [Adam Apple](#)

Enable Delete

Name	Type	MAC Address	Serial	Port	Protocol	Featureset	Term ID
SPA942	Linksys - SPA942	000E083CE52C			SIP	Voice	
Bria_PC	Bria - for PCs				SIP	Voice	

Any existing Terminals will show in the list. To add a new soft phone choose **Add Softphone** from the box on the right hand side.

Add

- Add Note
- Add Terminal
- Add Softphone**
- Add H323

Note that if you add more than one Terminal (either desk phone or soft phone) to the list, then you will be billed for the user as a Multi-Terminal Subscriber.

EDIT SUBSCRIBER [SUB:00114902 ADAM APPLE] - ADD SOFTPHONE

[Inclarity Test Partner](#) / [Inclarity Test Direct Sales](#) / [Mike Nudd Demo](#) / [Mike Nudd test site](#) / [Adam Apple](#)

Friendly Name:

Softphone Type: **--Please Select--** [Set Softphone Type](#)

- Bria - for mobile services
- Bria - for PCs
- SIPHONE - for mobile services
- SIPHONE - for PCs/Mac

You will need to give the new phone a **Friendly Name**, and you will need to choose the **Softphone Type**:

- **Bria – for mobile services:** Legacy product DO NOT SELECT
- **Bria – for PC:** Standard Inclarity PC Phone
- **SIPHONE – for mobile services:** New mobile soft phone (billed monthly)
- **SIPHONE – for PCs/Mac:** New desktop soft phone (billed monthly)

Please ensure that you select the correct product to a) meet the customer's requirements and b) guarantee you are billed correctly.

If you select **Bria – for PCs** then you will see a screen similar to the below.

EDIT SUBSCRIBER [SUB:00114902 ADAM APPLE] - ADD SOFTPHONE

[Inclarity Test Partner](#) / [Inclarity Test Direct Sales](#) / [Mike Nudd Demo](#) / [Mike Nudd test site](#) / [Adam Apple](#)

Friendly Name:

Softphone Type:

Version:

Protocol: [Set Protocol](#)

IP Mask: [Review Allowed Range](#)

Featureset:

TimeZone:

As per desk phone Terminals, the only configurable setting is the **Featureset**, which actually specifies the codec priority of the device:

- **Voice:** G729 (basic quality, low bandwidth)
- **New Voice:** G711 (high quality, high bandwidth)
- **HD Voice:** G722 (HD quality, very high bandwidth)

By default you should select **New Voice**. When you are ready press **Save** to add the Terminal to the Subscriber.

If you select either version of the SIPHONE soft phone then you will see a screen similar to the below.

EDIT SUBSCRIBER [SUB:00114902 ADAM APPLE] - ADD SOFTPHONE

[Inclarity Test Partner](#) / [Inclarity Test Direct Sales](#) / [Mike Nudd Demo](#) / [Mike Nudd test site](#) / [Adam Apple](#)

Friendly Name:

Softphone Type:

Version:

Protocol: [Set Protocol](#)

IP Mask: [Review Allowed Range](#)

Featureset:

TimeZone:

Disclaimer:

I Agree

You will need to tick the **I Agree** box and press **Save** to continue. You will then see some additional fields appear.

SIP User Name:

SIP Password:

Authorisation Name:

At this stage you will need to contact Inclarity Customer Services, as the software setup can only be completed by Inclarity. In your ticket confirm the Subscriber number/ID and the type of client required and our team will take care of the rest.

You can remove unwanted soft phones from the list by ticking Enable Delete and then selecting Delete against the relevant Terminal entry - as per the previous section **Add/Remove Terminal (Desk Phone)**.

7. Add/Edit/Remove UC Client

The Inclarity UC Client is a powerful tool that serves as a contact aggregator and CRM integrator, providing screen pop and click to dial options that enhance the user's telephony experience. The UC Client is a chargeable piece of additional software that must be run on the user's computer desktop.

To apply the UC Client to a Subscriber you must first search for and open the Subscriber in SMT.

EDIT SUBSCRIBER [SUB:00114902 ADAM APPLE] - GENERAL DETAILS

[Inclarity Test Partner](#) / [Inclarity Test Direct Sales](#) / [Mike Nudd Demo](#) / [Mike Nudd test site](#) / [Adam Apple](#)

Number: +44(0)1158561461
 Extension: 461
 First Name: Adam
 Last Name: Apple
 Email Address: email@example.com
 Mobile: 07123456890
 Password (numeric): [Password Set] [Change Password](#)
 Activation Status: [Enabled]

From the Services menu on the left select **Call Management**.

EDIT SUBSCRIBER [SUB:00114902 AMY APRICOT] - CALL MANAGEMENT

[Inclarity Test Partner](#) / [Inclarity Test Direct Sales](#) / [Mike Nudd Demo](#) / [Mike Nudd test site](#) / [Amy Apricot](#)

Call Management Enabled:

Click to Dial:

Directory Access Enabled:

FMC Enabled:

Speed Dial Enabled: [\[Settings\]](#)

Call Redirection Enabled: [\[Settings\]](#)

Call Filtering Enabled: [\[Settings\]](#)

Open Periods: [\[Settings\]](#)

Redirect Authorization: [\[Settings\]](#)

On Busy Action: [\[Settings\]](#)

On Not Reachable Action: [\[Settings\]](#)

Do Not Disturb:

Toolbar:

Inclarity UC: [\[Settings\]](#)

TAPI:

There is a line here for Inclarity UC but it is unselected and locked (greyed out) by default. To unlock the setting click the Unlock button and then you can tick the box to activate the service.

Inclarity UC: [\[Settings\]](#)

By default the Lite version of the UC Client is activated, giving the user access to Outlook and Skype for Business (Lync) integration only. If the superior DB version of the UC Client is needed to provide full CRM integration then you will need to click on the Settings link to adjust it.

Here you can select the type of license which you will be using for Inclarity UC.

Inclarity UC License Type:

After making these changes ensure that you press the  **Save** button to save your changes to the system.

Note that since the UC Client is a chargeable feature, SMT will automatically detect each enablement and apply the new charges to your next invoice.

8. Add/Edit/Remove Voice Mail

Every user has personal Voice Mail options for his or her Extension number. Some of these options – such as custom recorded greeting - must be managed via dial-in on 1571. Other options must be managed online via the portal. These same online options are available in both Phone Manager (end user portal) and SMT (administrator portal).

To access a Subscriber's Voice Mail you must first search for and open the Subscriber in SMT.

From the Services menu on the left select **Voice Mail**.

This screen shows similar selections to what the end user would see in the Phone Manager portal.

Voice Mail is enabled as a feature by default. If you do not want the user to have access to this feature then against **Enabled** press the **Unlock** button, untick the box and press **Save** underneath.

Similarly, for e-mail forwarding against Attach Voicemail Message press the **Unlock** button, tick the box and press **Save** underneath.

Note that **Notification E-Mail** box will need to be completed with a valid e-mail address to receive the Notifications (and Voice Mail messages, if enabled).

If the **Transfer on 0 to Phone Number** option is checked, and a forwarding number is specified in the box, then when the caller reaches the voicemail prompt if they press 0 they will be transferred to the target number.

9. Add/Edit/Remove Follow Me

Every user has personal call forwarding options for his or her Extension number called Follow Me. Each user can self-manage his or her Follow Me settings via Phone Manager, but occasionally it may be necessary to intervene on the user's behalf.

To access a user's Follow Me you must first search for and open the Subscriber in SMT.

From the Services menu on the left select **Call Management**.

Next to the line **Call Redirection Enabled** there will be a **Settings** link – click on this.

Here you will see a screen which looks very similar to what the end user would see in the Phone Manager portal.

To add a call forwarding number in the Alternative Numbers box enter a **Name** for the forwarding entry and the target **Phone number** and then press the Add button.

Alternative Numbers			
Name	Phone number		
Mobile	07123456890	Edit	Delete
<input type="text"/>	<input type="text"/>	<input type="button" value="Add"/>	

You can **Edit** or **Delete** an existing call forwarding rule by clicking on the relevant link next to it in the list.

You can flip between forwarding entries by updating the Follow Me Rule details.

Follow Me Rule

Ring all alternative numbers simultaneously

Forward calls to the following destination

Alternative Destination:

Try extension first for

You can also control whether or not the user's VoIP Terminals ring first, and if so for how long using the tools in the same box:

Try extension first for seconds

After making any changes in the Call Redirection window ensure that you press the **Save** button to save your changes to the system.

There are also separate **On Busy** and **On Not Reachable** forward actions which can be managed from the same area.

EDIT SUBSCRIBER [SUB:00114902 ADAM APPLE] - CALL MANAGEMENT

[Inclarity Test Partner](#) / [Inclarity Test Direct Sales](#) / [Mike Nudd Demo](#) / [Mike Nudd test site](#) / [Adam Apple](#)



Call Management Enabled:	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Click to Dial:	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Directory Access Enabled:	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
FMC Enabled:	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Speed Dial Enabled:	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	[Settings]
Call Redirection Enabled:	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	[Settings]
Call Filtering Enabled:	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	[Settings]
Open Periods:	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	[Settings]
Redirect Authorization:	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	[Settings]
On Busy Action:	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	[Settings]
On Not Reachable Action:	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	[Settings]
Do Not Disturb:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Toolbar:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Inclarity UC:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	[Settings]
TAPI:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Both options will present a very similar window, which will be locked (greyed out) by default.



EDIT SUBSCRIBER [SUB:00114902 AMY APRICOT] - ON BUSY ACTION

[Inclarity Test Partner](#) / [Inclarity Test Direct Sales](#) / [Mike Nudd Demo](#) / [Mike Nudd test site](#) / [Amy Apricot](#)


Here you can setup the termination action of inbound calls when an extension is busy.

On Busy :

=> Number to divert to:



 Save

To unlock each field press the unlock button . You can then make your selection.



EDIT SUBSCRIBER [SUB:00114902 AMY APRICOT] - ON BUSY ACTION

[Inclarity Test Partner](#) / [Inclarity Test Direct Sales](#) / [Mike Nudd Demo](#) / [Mike Nudd test site](#) / [Amy Apricot](#)


Here you can setup the termination action of inbound calls when an extension is busy.


 

On Busy :

=> Number to divert to:

 Save

After making any changes in the Call Redirection window ensure that you press the  **Save** button to save your changes to the system.

IMPORTANT

The On Busy and On Not Reachable responses will not work if the Active box is not checked under the Call Redirection Settings.

10. Add/Edit/Remove Hunt Group

A Hunt Group is a special object which is owned by and accessed from Site level. Every Hunt Group has its own telephone number, and includes tools to redirect calls on that telephone number to any number of Subscribers in any order.

To manage a Hunt Group you must first find and click on the relevant Site.

In the **Services** menu on the left-hand side there is a **Hunt Groups** option – click on this.

ID	Hunt Group ^Δ	Status	Number	Extension	Pivot			Site
group:52874	RESIDENTIAL123456789	Active	+44 (0) 115 8561469	469	123456469	Member Status	Activate All Members	Mike Nudd test site

Any existing Hunt Groups will show as clickable objects. If there are no existing Hunt Groups this area will be blank.

To add a new Hunt Group go to the **Add** box on the right-hand side.

Alternatively, to edit an existing Hunt Group simply click on its ID number in the list. Either way, you will see a window similar to the below.

EDIT SITE [SITE:35066 MIKE NUDD TEST SITE] - ADD HUNT GROUP

[Inclarity Test Partner](#) / [Inclarity Test Direct Sales](#) / [Mike Nudd Demo](#) / [Mike Nudd test site](#)

General | Open Periods | Advanced

Group Name:

External Number: +44(0)1158561468 - 468

Email:

Active:

TimeZone: (GMT) Greenwich Mean Time : Dublin, Edinburgh, Lisbon, London

Members: Site: Mike Nudd test site

212 - Harry Hamburger	<input type="button" value=">"/>	<input type="button" value="Up"/>
461 - Adam Apple	<input type="button" value="<"/>	<input type="button" value="Down"/>
462 - Billy Banana		
463 - Colin Cucumber		
465 - Ethan Elderflower		
466 - Fred Falafel		
467 - George Grape		

Automatically activate all group members

Enter a **Group Name**, choose the **External Number**, select the members of the group, and configure all other relevant settings.

For a new Hunt Group and press **Add Hunt Group** underneath to save the new Hunt Group to the system. For an existing Hunt Group you should instead press the **Save** button.

Choosing the members of a Hunt Group is simply a question of using the arrow buttons > and < and the Up and Down keys to include or omit the relevant Subscribers from the list on the right-hand side.



Note that every Hunt Group comes with an activity period controlled via the **Open Periods** tab.

EDIT SITE [SITE:35066 MIKE NUDD TEST SITE] - ADD HUNT GROUP

[Inclarity Test Partner](#) / [Inclarity Test Direct Sales](#) / [Mike Nudd Demo](#) / [Mike Nudd test site](#)

General | **Open Periods** | Advanced

Here you can designate time slots for the Hunt Group to be open for incoming calls. You can allocate more time slots to create complex situations.

TimeZone: (GMT) Greenwich Mean Time : Dublin, Edinburgh, Lisbon, London

Add Period:

Start Day: Monday End Day: Monday Start Time: 00:00 End Time: 00:00

Start Day	End Day	Start Time	End Time		
Monday	Sunday	00:00	23:59	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>

Automatically activate all group members

The default settings ensure that the Hunt Group is active all the time 24x7, 7 days a week. However you can modify these settings to a more limited time frame, to leverage a **Closed** action outside of these hours (see below).

Note that you can also **Add** multiple, separate slots that would all be considered Open. (E.g. 9am-5pm weekdays, 10am-1pm Saturdays.)

The **Advanced** tab is used to define all other Hunt Group settings.

These Settings include:

- **Distribution Method** – the method for hunting the group members

Cyclic	Rotate through the list, starting with the next user for each call	Random	Pick at random
Fixed	Start with the same user for each call	Parallel	Ring everyone simultaneously
Longest Idle	Pick longest idle		

- **Extension Timeout** – how long each user is rung for
- **Global Timeout** – how long the system keeps hunting before it gives up
- **Queue Size** – redundant field for Broadsoft users
- **Terminal Display Name** – redundant field for Broadsoft users
- **Call Reporting** – activates Quick Start Call Reporting (chargeable feature)
- **Voicemail** – whether or not the Hunt Group has a voicemail box
- **Voicemail PIN** – if Voicemail is enabled, the PIN for accessing the box
- **Email notifications** – if Voicemail is enabled, members receive e-mail notifications when messages are left
- **Allow Call Waiting on Agents** – pass calls to users who have Call Waiting enabled and are on the phone
- **On Closed** – enable a call forwarding or voicemail response for outside of the Open Period
- **On Global Timeout** – enable a call forwarding or voicemail response for when the Timeout is hit
- **On Busy Action** – enable a call forwarding or voicemail response for when everyone responds as busy
- **On Not Reachable** – enable a call forwarding or voicemail response for when everyone is offline
- **Calling Line ID Settings** – include the Hunt Group name as the SIP Display Name passed to the users
- **Music On Hold** – choose the on-hold music for callers routed via the Hunt Group

To delete a Hunt Group which is no longer needed return to the list of Hunt Groups and tick the **Enable Delete** box in the upper left corner.

EDIT SITE [SITE:35066 MIKE NUDD TEST SITE] - HUNT GROUPS									
Inclarity Test Partner / Inclarity Test Direct Sales / Mike Nudd Demo / Mike Nudd test site									
<input checked="" type="checkbox"/> Enable Delete Click on the hunt group ID to edit.									
ID	Hunt Group ^A	Status	Number	Extension	Pivot			Site	
group:52874	RESIDENTIAL123456789	Active	+44 (0) 115 8561469	469	123456469	Member Status	Activate All Members	Mike Nudd test site	Delete

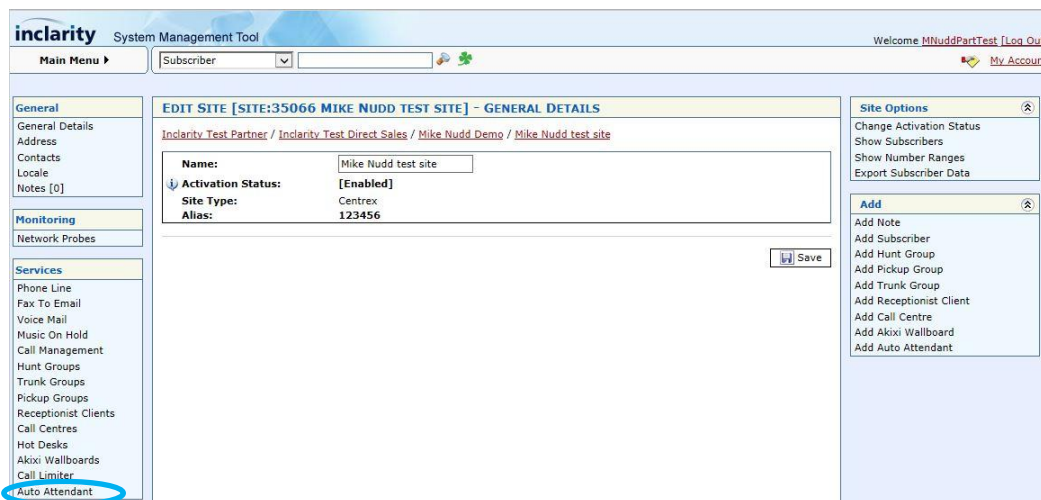
Press the **Delete** link next to the Hunt Group entry to remove it from our database and return the associated DDI number back to your free pool.

11. Add/Edit/Remove Auto Attendant

An Auto Attendant is a special object which is owned by and accessed from Site level. Every Auto Attendant has its own telephone number, and includes tools to provide an automated greeting when it is called, before triggering 1 or more dialed digit actions.

Historically Inclarity has not provided permission to all partners to manage this feature. If you cannot see the Auto Attendant feature using your SMT login then please contact Inclarity Customer Services.

To add, edit or remove an Auto Attendant you must first find and click on the relevant Site.



In the **Services** menu on the left-hand side there is an **Auto Attendant** option – click on this.



Any existing Auto Attendants will show as clickable objects. If there are no existing Auto Attendants this area will be blank.

To add a new Auto Attendant go to the **Add** box on the right-hand side.



Alternatively, to edit an existing Auto Attendant simply click on its ID number in the list. Either way, you will see a window similar to the below.

EDIT SITE [SITE:35066 MIKE NUDD TEST SITE] - ADD AUTO ATTENDANT

[Inclarity Test Partner](#) / [Inclarity Test Direct Sales](#) / [Mike Nudd Demo](#) / [Mike Nudd test site](#)

Name:

External Number:

Services	New Auto Attendant
<ul style="list-style-type: none"> Play Message Press Key No Input No Match 	<p>AA 01158561468</p>

When adding a new Auto Attendant you will need to give it a **Name** and assign the **External Number**. Then underneath you can define the behaviour of the menu.

Best practice is normally to begin by adding a **Play Message** action as the initial response when someone dials the menu.

Services	New Auto Attendant
<ul style="list-style-type: none"> Play Message Press Key No Input No Match 	<p>AA 01158561468</p> <p> Play Message</p> <div style="border: 1px solid gray; padding: 5px; margin-top: 10px;"> <p>Play Message Action</p> <p>Message <input type="text" value="Browse..."/></p> <p><input type="checkbox"/> Welcome Message</p> <p><input type="checkbox"/> Dial Extension Directly</p> <p><input type="button" value="Cancel"/> <input type="button" value="Ok"/></p> </div>

The box will prompt you to load a pre-recorded audio file. This file must be 8-bit 8khz mono .wav format for it to be accepted by the system.

If you tick **Dial Extension Directly** then while the prompt is playing the caller can dial any user Extension to be put directly through to that user.

Press **OK** to save your changes to the menu.

After adding your initial greeting you will need to add at least **Press Key** option for the caller to dial through.



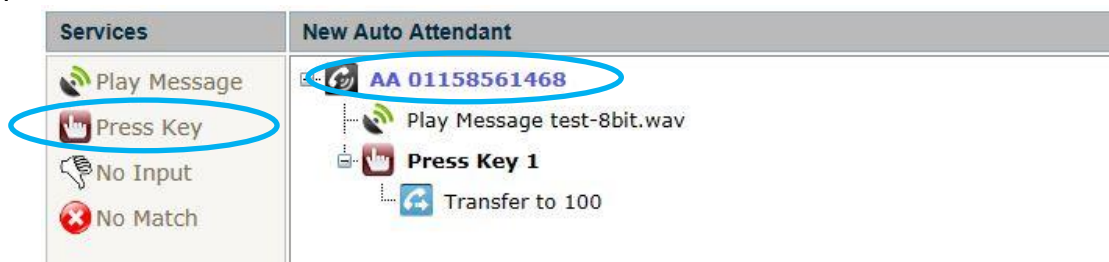
After selecting **Press Key**, choose the dialled digit that will apply from the drop-down. Then choose the Press Key object in the menu itself to define the associated action for that key.





Possible choices:

- **Remove** – delete the Key entry
- **Play Message** – load a pre-recorded audio greeting as per above
- **Press Key** – dial another digit, which will have its own configured response
- **Transfer** – conduct a call transfer. The target number can be a local Extension number, Auto Attendant or Hunt Group number, or any third party telephone number
- **Voicemail** – transfer the caller to voicemail
- **Dial Extension** – provide a prompt for the caller to dial user Extension numbers
- **End Call** – terminate the call
- **No Input** – provide a timeout response if nothing else happens
- **No Match** – provide a response if the caller dials any undefined digits
- **Goto Menu** – send caller back to the top of the menu tree

After defining your first key, click back on the Auto Attendant number at the root of the menu tree to define another key.



When you have finished defining your menu options, press the  **Add Auto Attendant** button at the bottom of the window.

The process for editing an existing Auto Attendant is the same except that after making changes you should press the  **Save** button instead.

IMPORTANT

Note that the logic of the menu is such that if you remove an object in the tree that has child objects attached, then all of these objects will be deleted.

Also note that audio greeting files cannot be downloaded once they are uploaded. We recommend that you retain local copies of all greeting audio files, in the event that they need to be re-loaded.

To delete an Auto Attendant which is no longer needed return to the list of Hunt Groups and tick the **Enable Delete** box in the upper left corner.

EDIT SITE [SITE:35066 MIKE NUDD TEST SITE] - AUTO ATTENDANT

[Inclarity Test Partner](#) / [Inclarity Test Direct Sales](#) / [Mike Nudd Demo](#) / [Mike Nudd test site](#)

Enable Delete

Click on the Auto Attendant ID to edit.

ID	AA ID	Number	Extension	Site	
aa:17113	TestAA1	01158561460	460	Mike Nudd test site	Delete

Press the **Delete** link next to the Auto Attendant entry to remove it from our database and return the associated DDI number back to your free pool.

12. Add/Edit/Remove Receptionist Client

A Receptionist Client is a special object which is owned by and accessed from Site level. A Receptionist Client is a special utility for monitoring and managing all activity against a particular telephone number. The number will serve as a special type of Hunt Group, where every Operator will be rung by the inbound calls, and will also have the opportunity to reorder, redirect and transfer those inbound calls. The Receptionist Client can also monitor the current Presence status of selected colleagues to inform the Receptionist user as to who may be available to take a call (or call transfer).

To add, edit or remove a Receptionist Client you must first find and click on the relevant Site.

In the **Services** menu on the left-hand side there is a **Receptionist Clients** option – click on this.

ID	Receptionist Client	Status	Number	Extension	Pivot	Site
group:60354	RECEPTION	Inactive	+44 (0) 115 8561468	468	123456468	Mike Nudd test site

Any existing Reception Clients will show as clickable objects. If there are no existing Reception Clients this area will be blank.

To add a new Reception Client go to the **Add** box on the right-hand side.

Alternatively, to edit an existing Receptionist Client simply click on its ID number in the list. Either way, you will see a window similar to the below.

EDIT SITE [SITE:35066 MIKE NUDD TEST SITE] - ADD RECEPTIONIST CLIENT

[Inclarity Test Partner](#) / [Inclarity Test Direct Sales](#) / [Mike Nudd Demo](#) / Mike Nudd test site

General | CallDelivery | Supervisors | Operators | Open Periods | Announcements | Advanced

Group Name:

External Number: +44(0)1158561468 - 468 ▼

Active:

Console Password (numeric): PIN: Confirm PIN: [Set PIN *](#)

When adding a new Receptionist on the **General** tab you will need to give it a Name and assign the External Number and tick the Active box. Then you can go on to define the rest of the settings.

The **Call Delivery** tab defines the inbound call behaviour to the assigned telephone number.

EDIT SITE [SITE:35066 MIKE NUDD TEST SITE] - ADD RECEPTIONIST CLIENT

[Inclarity Test Partner](#) / [Inclarity Test Direct Sales](#) / [Mike Nudd Demo](#) / Mike Nudd test site

General | **CallDelivery** | Supervisors | Operators | Open Periods | Announcements | Advanced

Distribution Method: Circular ▼

Queue Length: 10 calls in queue

Bounced Calls

Bounce Calls after 2 rings

Bounce calls if agent becomes unavailable while routing the call

Alert agent if call is on hold for longer than 30 seconds

Bounce calls after being on hold by agent for longer than 60 seconds

Overflow

Enable overflow after calls wait 120 seconds.

Play ringback

Transfer to voicemail

Transfer to an alternative number:

Play announcement before overflow processing

Stranded Call Action

Leave in queue

Transfer to voicemail

Transfer to an alternative number:

The **Distribution Method** defines the order in which the Receptionist Operators are rung.

- **Circular** – start with the next Operator in the sequence for each call
- **Regular** – start with the same Operator for each call
- **Simultaneous** – ring all Operators at the same time
- **Uniform** – ring Operators in order from most to least idle
- **Weighted Call Distribution** – not currently supported (ignore)

The **Queue Length** defines how many calls will be let through the queue to ring on Operator phones. Best practice is to set this value to the number of available Operators.

The settings under **Bounced Calls** allow you to define what happens to the call if the current Operator does not answer. (Note however that this only works when your Distribution Method is not Simultaneous.)

The settings under **Overflow** allow you to trigger a failover option if a call remains unanswered after a specified period of time.

The **Stranded Call Action** will trigger if there is nowhere else for the call to go – e.g. there are no Operators signed in, or the Distribution Method has been exhausted.

Ignore the **Supervisors** tab – this does not provide any functionality for Receptionist numbers.

On the **Operators** tab you can define which users will be Receptionist Operators, who will be rung by incoming calls, and who will have access to the Receptionist Client.

EDIT SITE [SITE:35066 MIKE NUDD TEST SITE] - ADD RECEPTIONIST CLIENT

[Inclarity Test Partner](#) / [Inclarity Test Direct Sales](#) / [Mike Nudd Demo](#) / [Mike Nudd test site](#)

General CallDelivery Supervisors **Operators** Open Periods Announcements Advanced

Showing available operators for site: Mike Nudd test site

Available Operators

- 212 - Harry Hamburger
- 463 - Colin Cucumber
- 465 - Ethan Elderflower
- 466 - Fred Falafel
- 467 - George Grape

Call Centre Operators

- 461 - Adam Apple
- 462 - Billy Banana

Add Receptionist Client Back

Simply select the names of the relevant Subscribers and use the arrow keys to move them into and out of the list. Note that every Operator is licensed and charged for separately (in addition to their basic Subscriber costs).

The **Open Periods** tab allows you to specify when the Reception is available to take calls. This is similar to the Hunt Group function that you can define a Closed action for incoming calls which are received outside of the defined Open Period.

EDIT SITE [SITE:35066 MIKE NUDD TEST SITE] - ADD RECEPTIONIST CLIENT

[Inclarity Test Partner](#) / [Inclarity Test Direct Sales](#) / [Mike Nudd Demo](#) / [Mike Nudd test site](#)

General CallDelivery Supervisors Operators **Open Periods** Announcements Advanced

Here you can designate time slots for the Call Center to be open for incoming calls. You can allocate more time slots to create complex situations.

TimeZone: (GMT) Greenwich Mean Time : Dublin, Edinburgh, Lisbon, London

Add Period:

Start Day: Monday End Day: Monday Start Time: 00:00 End Time: 00:00

Add

Start Day	End Day	Start Time	End Time	Edit	Delete
Monday	Sunday	00:00	23:59	Edit	Delete

On Closed: No Action

Add Receptionist Client Back

The **Announcements** tab allows you to define what automated greetings are played to the caller during the various stages of the call.

EDIT SITE [SITE:35066 MIKE NUDD TEST SITE] - ADD RECEPTIONIST CLIENT

[Inclarity Test Partner](#) / [Inclarity Test Direct Sales](#) / [Mike Nudd Demo](#) / [Mike Nudd test site](#)

General CallDelivery Supervisors Operators Open Periods **Announcements** Advanced

Entrance Message

Play
Entrance Message:

Mandatory

Estimated Wait

Play Estimated Wait message

Announce queue position for users with position less than:

Announce wait time for users expected to wait less then minutes:

Play estimated wait message every seconds

Play message for users beyond above limits

Music

Play Music:

Comfort Message

Play Comfort Message:

Play comfort message every seconds

- The **Entrance Message** will play when the user enters the call queue (because the Receptionist user is busy or not online). If the Mandatory box is ticked the message will play to all callers before they are delivered to the Receptionist user (even when they are available).
- The **Estimated Wait** message will play periodically to callers held in the queue.
- The **Music** will be played to callers in the queue (and will be punctuated by the Estimated Wait and Comfort Messages if they are selected).
- The **Comfort Message** is an additional message that can be played periodically to callers held in the queue to keep them informed of what is happening.

The **Advanced** tab allows you to define some additional settings:

EDIT SITE [SITE:35066 MIKE NUDD TEST SITE] - ADD RECEPTIONIST CLIENT

[Inclarity Test Partner](#) / [Inclarity Test Direct Sales](#) / [Mike Nudd Demo](#) / [Mike Nudd test site](#)

General CallDelivery Supervisors Operators Open Periods Announcements **Advanced**

Escape Digit: Allow callers to dial to escape out of queue.

Block Outgoing Line Id:

Voicemail Enabled:

E-mail the voicemail to

Voicemail PIN (numeric): PIN: Confirm PIN: [Set PIN *](#)

Allow Call Waiting on Agents:

To add your new Receptionist Client press the **Add Receptionist Client** button. If you are editing an existing Receptionist Client then simply press **Save** at the bottom instead.

Note that there is an additional **Monitored** tab which only appears to the administrator after the Receptionist Client entry has been saved. You should return to the same Receptionist Client object after saving to view and edit this tab.

The purpose of this tab is to enable your receptionist user(s) to view the SIP presence status of the other users within the same organisation – i.e. within the Receptionist Client window itself each **Monitored User** will appear in the **Favourites** section with a coloured dot to indicate their status.

You can add **Monitored Users** by selecting them in the left box and using the arrows to move them to/from the right box. You can also use the drop-down list provided to select other Sites, and other users from those Sites.

As usual ensure you press  **Save** after making any changes to make them live on the system.

To delete a Receptionist which is no longer needed return to the list of Hunt Groups and tick the **Enable Delete** box in the upper left corner.

ID	Receptionist Client	Status	Number	Extension	Pivot	Site	
group:61973	RECEPTION	Active	+44 (0) 115 8561468	468	123456468	Mike Nudd test site	Delete

Press the **Delete** link next to the Receptionist entry to remove it from our database and return the associated DDI number back to your free pool.

13. Add/Edit/Remove ACD (Call Centre) Group

An Automated Call Distribution (ACD) Group is a superior form of Hunt Group which allows agents in a call centre environment to dynamically control their availability to receive inbound calls.

Typically an ACD Agent will default to a 'logged out' status and will thusly be invisible and not included in the hunting of incoming calls. The Agent would need to change to a 'logged in' status to become active and included in the hunting. The Agent would control his or her own status through a) Phone Manager, b) the ACD Agent Client, or c) through dial-in access code, but the ACD Group itself is managed by the Administrator via SMT against the Site.

To add, edit or remove an ACD/Call Centre Group you must you must first find and click on the relevant Site.

In the **Services** menu on the left-hand side there is a **Call Centres** option – click on this.

ID	Call Centre	Status	Number	Extension	Site
group:53912	CALLCENTRE	Active	+44 (0) 115 8561464	464	Mike Nudd test site

Any existing Call Centres will show as clickable objects. If there are no existing Call Centres this area will be blank. To add a new Call Centre go to the **Add** box on the right-hand side.

Alternatively, to edit an existing Call Centre simply click on its ID number in the list. Either way, you will see a window similar to the below.

EDIT SITE [SITE:35066 MIKE NUDD TEST SITE] - ADD CALL CENTRE

[Inclarity Test Partner](#) / [Inclarity Test Direct Sales](#) / [Mike Nudd Demo](#) / [Mike Nudd test site](#)

General Agents Call Delivery Supervisors Open Periods Announcements Advanced

Group Name:

External Number: +44(0)1158561468 - 468 ▼

Active:

Add Call Center

When adding a new Call Centre on the **General** tab you will need to give it a Name and assign the **External Number** and tick the **Active** box. Then you can go on to define the rest of the settings.

The **Agents** tab allows you to manage which of your Subscribers are members of the Call Centre.

EDIT SITE [SITE:35066 MIKE NUDD TEST SITE] - ADD CALL CENTRE

[Inclarity Test Partner](#) / [Inclarity Test Direct Sales](#) / [Mike Nudd Demo](#) / [Mike Nudd test site](#)

General **Agents** Call Delivery Supervisors Open Periods Announcements Advanced

Agent Settings

Allow agents to join Call Centers

Allow Call Waiting on agents

Enable calls to agents in wrap-up state

Enable maximum ACD wrap-up timer min 30 secs

Automatically set agent state to Available ▼ after call.

Call Centre Participation

Showing available subscribers for site: Mike Nudd test site ▼

Available Subscribers

212 - Harry Hamburger
 461 - Adam Apple
 462 - Billy Banana
 463 - Colin Cucumber
 465 - Ethan Elderflower
 466 - Fred Falafel
 467 - George Grape

Call Centre Agents

Agents Status

[No agents selected]

Add Call Center

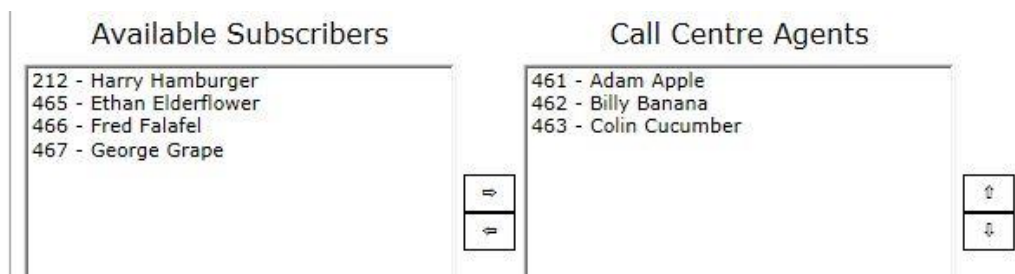
Under **Agent Settings**:

- **Allow agents to join Call Centers**
Check to allow your agents to sign in and out themselves. Unchecked means that a Supervisor would need to sign them in and out instead.
- **Allow Call Waiting on agents**
Check to tell the system to honour any personal Call Waiting features activated on the Agent Subscribers. I.e. while they are on a call, new calls will still ring through to them.
- **Enable calls to agents in wrap-up state**
Check to tell the system to send new calls to Agents when they are in Wrap-Up ACD status.
- **Enable maximum ACD wrap-up timer**
Check and specify the interval in minutes and seconds after which the agent will be forcibly changes from Wrap-Up status to Available status.

- **Automatically set agent state after call**

Check and specify the preferred status to immediately move every agent to this status after each call.

Under **Call Centre Participation** you can specify which of your Subscribers will be Agents. Simply use the Left and Right arrow buttons to move users into the list, and use the Up and Down arrow buttons to determine the Agent order.



Please be aware that every Subscriber which is uplifted to Agent status will lead to an additional monthly charge on your bill for Call Centre licensing.

Once you have added some Subscribers you will see a new box will appear underneath reporting the current ACD state of each user.

Agents Status							
Agent	Ext.	Uses Client	Current State	Sign Out	Available	Unavailable	Wrap Up
Adam Apple	461	<input type="checkbox"/>	Signed Out	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Billy Banana	462	<input type="checkbox"/>	Signed Out	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Colin Cucumber	463	<input type="checkbox"/>	Signed Out	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please note that if you tick the box **Uses Client** against any user then this will unlock access to the ACD Agent/Call Centre Client for the user via the Phone Manager portal (and will charge you an additional fee per month per user for this access).

The **Call Delivery** tab – similar to Hunt Group and Receptionist above – controls many aspects of the inbound call behaviour.

The **Distribution Method** defines the order in which the Call Centre Agents are rung.

- **Circular** – start with the next Agent in the sequence for each call
- **Regular** – start with the same Agent for each call
- **Simultaneous** – ring all Agents at the same time
- **Uniform** – ring Agents in order from most to least idle
- **Weighted Call Distribution** – not currently supported (ignore)

General Agents **Call Delivery** Supervisors Open Periods Announcements Advanced

Distribution Method: Circular

Queue Length: 10 calls in queue

Bounced Calls

Bounce Calls after 2 rings

Bounce calls if agent becomes unavailable while routing the call

Alert agent if call is on hold for longer than 30 seconds

Bounce calls after being on hold by agent for longer than 60 seconds

Overflow

Enable overflow after calls wait 120 seconds.

Play ringback

Transfer to voicemail

Transfer to an alternative number:

Play announcement before overflow processing Browse... Upload File

Stranded Call Action

Leave in queue

Transfer to voicemail

Transfer to an alternative number:

The **Queue Length** defines how many calls will be let through the queue to ring on Agent phones.

The settings under **Bounced Calls** allow you to define what happens to the call if the current Agent does not answer.

The settings under **Overflow** allow you to trigger a failover option if a call remains unanswered after a specified period of time.

The **Stranded Call Action** will trigger if there is nowhere else for the call to go – e.g. there are no Agents signed in, or the Distribution Method has been exhausted.

On the **Supervisors** tab you can define which of your Subscribers will be Supervisors.

General Agents Call Delivery **Supervisors** Open Periods Announcements Advanced

Showing available subscribers for site: Mike Nudd test site

Available Subscribers

212 - Harry Hamburger
461 - Adam Apple
462 - Billy Banana
463 - Colin Cucumber
465 - Ethan Elderflower
466 - Fred Falafel
467 - George Grape

Call Centre Supervisors

You can choose one of your Call Centre Agents, or you can choose a user who is not an Agent. Either way, each nominated Supervisor will have superior permission to manage your Agents, and will have access to the dedicated Supervisor Client via the Phone Manager portal. (Also note that for each nominated Supervisor you will be charged an additional monthly license per month per user.)

IMPORTANT

Inclarity recommends enabling your super users as Supervisors of the Akixi reporting tool instead of the above, as Akixi offers better reporting, and a smoother user experience.

The **Open Periods** tab – similar to Hunt Groups and Receptionist above – allows you to define when the Call Centre is active. During the defined period(s) the Call Centre will process your calls, and outside of the defined period(s) the system will direct the call to the On Closed response defined underneath.

The **On Closed** action can be set to:

- **No Action**
The call is disconnected.
- **Transfer to Voicemail**
To the unique voice mail box associated with the Call Centre (see Advanced tab).
- **Redirect to Alternative Number**
Transfer the caller to the specified telephone number.

On the **Announcements** tab there are settings for defining what announcements will be heard by the caller before they are connected to an Agent.

- The **Entrance Message** will play initially as soon as the call is received.
- The **Estimated Wait** message will play periodically to callers held in the queue.
- The **Music** will be played to callers in the queue (and will be punctuated by the Estimated Wait and Comfort Messages if they are selected).
- The **Comfort Message** is an additional message that can be played periodically to callers held in the queue to keep them informed of what is happening.

The **Advanced** tab allows you to configure some additional settings.

Note that Voicemail enablement is required if you plan to use the On Closed action of the Call Centre to send the caller to voicemail out of hours.

Also note that it is currently compulsory to set the voicemail PIN even if you do not plan to use it.

To add your new Call Centre press the **Add Call Centre** button underneath. If you are editing an existing Receptionist Client then instead simply press **Save**.

To delete a Call Centre which is no longer needed return to the list of Call Centres under Services and tick the **Enable Delete** box in the upper left corner.

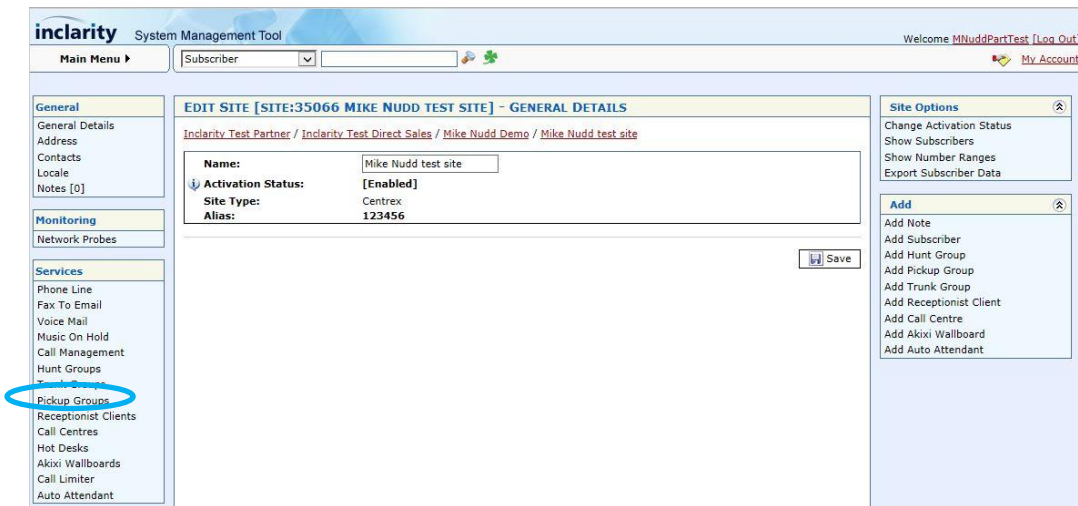
ID	Call Centre ^	Status	Number	Extension	Site	
group:53912	CALLCENTRE	Active	+44 (0) 115 8561464	464	Mike Nudd test site	Delete
group:61736	CCENTRE	Active	+44 (0) 115 8561468	468	Mike Nudd test site	Delete

Press the **Delete** link next to the Call Centre entry to remove it from our database and return the associated DDI number back to your free pool.

14. Add/Edit/Remove Pickup Group

A Pickup Group is a subset of Subscribers which are allowed to intercept each other's calls outside of the normal call flow sequence. I.e. if the phone of one user is left to ring, another user within the same Pickup Group who is not ringing can dial a special code to take that call on their phone.

To add, edit or remove a Pickup Group you must first find and click on the relevant Site.

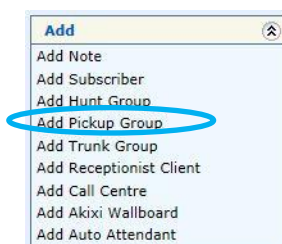


In the **Services** menu on the left-hand side there is a **Pickup Groups** option – click on this.



Any existing Pickup Groups will show as clickable objects in the list. If there are no existing Pickup Groups this area will be blank.

To add a new Pickup Group go to the **Add** box on the right-hand side.



Alternatively, to edit an existing Pickup Group simply click on its ID number in the list. Either way, you will see a window similar to the below.

EDIT SITE [SITE:35066 MIKE NUDD TEST SITE] - ADD PICKUP GROUP

[Inclarity Test Partner](#) / [Inclarity Test Direct Sales](#) / [Mike Nudd Demo](#) / [Mike Nudd test site](#)

Group Name:

Active:

Group Interceptors:

212 - Harry Hamburger	>	
461 - Adam Apple		
462 - Katie Kwik	<	
463 - Colin Cucumber		
465 - Ethan Elderflower		
466 - Fred Falafel		
467 - George Grape		

Group Interceptees:

212 - Harry Hamburger	>	
461 - Adam Apple		
462 - Katie Kwik	<	
463 - Colin Cucumber		
465 - Ethan Elderflower		
466 - Fred Falafel		
467 - George Grape		

You will need to give the **Group Name**, make sure the group is **Active**, and then select the **Group Interceptors** and **Group Interceptees**.

Interceptors are people who can dial the pickup code to intercept the calls. Interceptees are the people receiving the calls in the first place, from whom the calls can be intercepted.

To begin with the Interceptor and Interceptee lists are blank, but – as per Hunt Groups - you can add users by selecting them on the left-hand side and pressing the '>' Right arrow button. Similarly, if you need to remove a user from an active list select them on the right-hand side and press the '<' Left button arrow button.

Once you have finished building your new Pickup Group you should click on **Add Pickup Group** underneath.

The process for editing an existing Pickup Group is the same except that after making changes you should press the **Save** button instead.

15. Add/Edit/Remove Hot Desking

Hot Desking is the ability dynamically log in and out of different phones and have your Extension present on the 'live' phone, without ever having a dedicated phone.

To add, edit or remove a Hot Desking function you must first find and click on the relevant Site.

The screenshot shows the 'inclarity System Management Tool' interface. The top navigation bar includes 'Main Menu', a 'Subscriber' dropdown, and a 'Welcome MNUddPartTest [Log Out]' message. The left sidebar contains several menu categories: 'General', 'Monitoring', 'Services', and 'Network Probes'. The 'Services' menu is expanded, and 'Hot Desks' is highlighted with a blue circle. The main content area is titled 'EDIT SITE [SITE:35066 MIKE NUDD TEST SITE] - GENERAL DETAILS'. It displays the following information: Name: Mike Nudd test site; Activation Status: [Enabled]; Site Type: Centrex; Alias: 123456. A 'Save' button is located at the bottom right of this section. On the right side, there are two panels: 'Site Options' with links like 'Change Activation Status' and 'Export Subscriber Data', and an 'Add' panel with options like 'Add Note', 'Add Subscriber', and 'Add Auto Attendant'.

In the **Services** menu on the left-hand side there is a **Hot Desks** option – click on this.

The screenshot shows the 'EDIT HOTELING GROUP [SITE:35066 CUSTOMER:29746]' configuration page. The breadcrumb trail is 'Inclarity Test Partner / Inclarity Test Direct Sales / Mike Nudd Demo / Mike Nudd test site'. The page is divided into four main sections: 'Available Guests', 'Guests', 'Available Hosts', and 'Hosts'. Both 'Available Guests' and 'Available Hosts' sections contain a list of subscribers: 212 - Harry Hamburger, 461 - Adam Apple, 462 - Katie Kwik, 463 - Colin Cucumber, 465 - Ethan Elderflower, 466 - Fred Falafel, and 467 - George Grape. To the right of each list are two arrow buttons: a right-pointing arrow and a double-line arrow. The 'Guests' and 'Hosts' sections are currently empty, displaying the text 'No Guests Selected.' and 'No Hosts Selected.' respectively. A 'Save' button is located at the bottom right of the page.

The **Hosts** selection actually concerns the IP desk phones that are listed as Terminals for the named Subscribers in the list. By moving a Subscriber into the Host list using the '>' Right arrow button, you are actually enabling their listed Terminal to become a Host for other Hot Desk Guests.

The **Guests** selection concerns the Subscribers themselves as Hot Desk users, and their ability to log in dynamically to the nominated Host devices.

A Subscriber can be nominated as both a Guest and a Host.

A Guest can log into Host phone by dialling the voicemail prompt 1571 and waiting for the new 'hoteling' option that will be read out as part of the menu.

IMPORTANT:

Note that there is only one Hot Desk function per Site, and it concerns specifically users and terminals within that Site. I.e. it is not possible to Hot Desk between different Sites – if you have phones deployed across multiple physical sites, then these must be merged into a single Site in SMT to support Hot Desking.

Also note that Hot Desking only works when all of the Host users are single Terminal users, and all of these Hosts have physical IP telephones that support the Hot Desking feature (e.g. Polycom IP331).

If a Guest logs into a Host device then the device will update to use the Guest's Extension only. I.e. the Host's calls will no longer ring on that device. If the Subscriber associated with the Host does not log in as a Guest elsewhere then he or she will be unable to receive any calls.


A Guest ***must*** manually log out of a Host once he or she is finished. There is no dynamic timeout for Hot Desk sessions, and no other Guest will be able to log in until the previous Guest has logged out.

16. Block Selected Outgoing Calls

SMT includes tools to block outgoing calls to selected destinations. These blocks can be applied by any SMT Administrator at Site level or Customer level. At Site level the blocks will automatically apply to every Subscriber (and other object) underneath. At Customer level the blocks will apply to all Sites, and all objects underneath them.

To manage this feature at the Site level, first search and select the relevant Site.

In the **Services** menu on the left-hand side there is a **Phone Line** option – click on this.

If the Call Restriction feature is greyed out, first click on the  Block button to make it accessible.

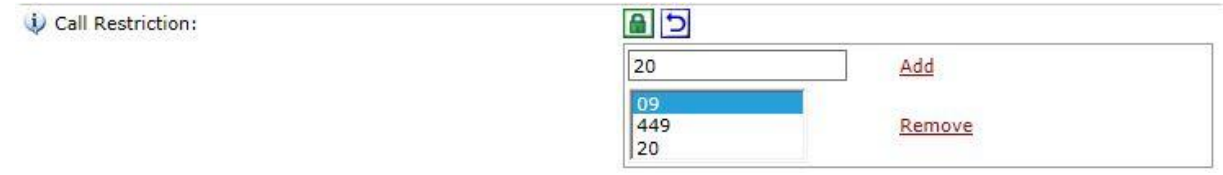




Call Restriction:  

[Add](#)

[No prefixes defined] [Remove](#)

Input each area code you would like to block (e.g. 09 and 449 for UK Premium Rate, or 20 for Egypt) into the box and press **Add** to save it into the list.



Call Restriction:  

20 [Add](#)

09 [Remove](#)

449

20

You can delete any unwanted entries by highlighting them and pressing **Remove**.

After making your changes ensure that you press the  **Save** button at the bottom of the window.

If you are not sure what codes to add into the list then please contact Inclarity Customer Services for advice.

To manage this feature at the Customer level, first search and select the relevant Customer.



inclarity System Management Tool

Main Menu ▾ Customer ▾ Mike Nudd  

Press **Find**.

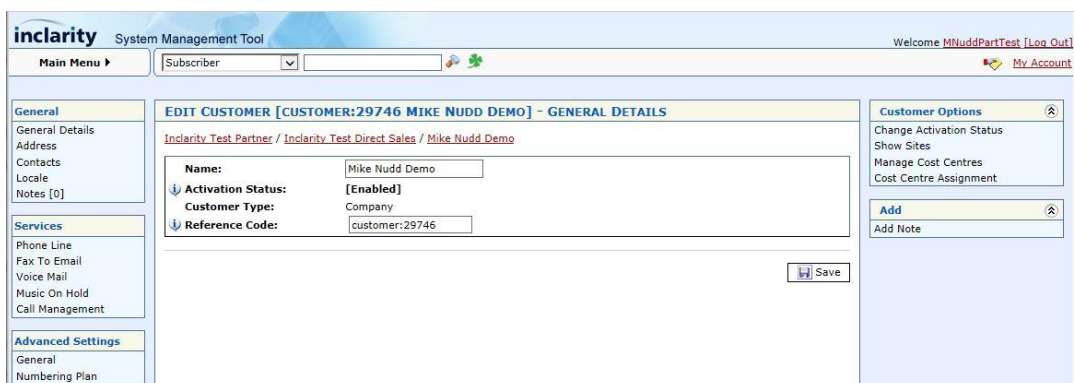
SEARCH RESULTS

FIND CUSTOMER: [MIKE NUDD]




Click on the customer ID to edit.

ID	Name	Reference Code	Customer Type	Status		Channel
customer:18726	Mike Nudd Test BW	customer:18726	Business	Active	[Show Sites]	Inclarity Test Direct Sales
customer:29746	Mike Nudd Demo	customer:29746	Business	Active	[Show Sites]	Inclarity Test Direct Sales

Select the relevant Customer **ID**.



inclarity System Management Tool Welcome MNuddPartTest [\[Log Out\]](#)

Main Menu ▾ Subscriber ▾    [My Account](#)

EDIT CUSTOMER [CUSTOMER:29746 MIKE NUDD DEMO] - GENERAL DETAILS


[Inclarity Test Partner](#) / [Inclarity Test Direct Sales](#) / [Mike Nudd Demo](#)


Name:

Activation Status: **[Enabled]**

Customer Type:

Reference Code:

 Save


Customer Options 

[Change Activation Status](#)

[Show Sites](#)

[Manage Cost Centres](#)

[Cost Centre Assignment](#)

Add 

[Add Note](#)

General

[General Details](#)

[Address](#)

[Contacts](#)

[Locale](#)

[Notes \[0\]](#)

Services

[Phone Line](#)

[Fax To Email](#)

[Voice Mail](#)

[Music On Hold](#)









































[Call Management](#)

Advanced Settings

[General](#)

[Numbering Plan](#)

From the **Services** menu on the left select **Phone Line**.

EDIT CUSTOMER [CUSTOMER:29746 MIKE NUDD DEMO] - PHONE LINE			
Inclarity Test Partner / Inclarity Test Direct Sales / Mike Nudd Demo			
Call Waiting:	  <input checked="" type="checkbox"/>		
Divert Calls:	  <input checked="" type="checkbox"/>		
Group Pickup:	  <input checked="" type="checkbox"/>		
Hold:	  <input checked="" type="checkbox"/>		
Incoming Calls:	  <input checked="" type="checkbox"/>		
Incoming Calls CLI Presentation:	  <input checked="" type="checkbox"/>		
Outgoing Calls:	  <input checked="" type="checkbox"/>		
Outgoing Calls CLI Presentation:	  <input checked="" type="checkbox"/>		
Pickup Calls:	  <input checked="" type="checkbox"/>		
Three Way Conferencing:	  <input checked="" type="checkbox"/>		
Transfer Calls:	  <input checked="" type="checkbox"/>		
Single Step Transfer:	  <input checked="" type="checkbox"/>		
Ring On Hold Call:	  <input checked="" type="checkbox"/>		
Park Calls:	  <input type="checkbox"/>		
Retrieve Calls:	  <input type="checkbox"/>		
Lock Line:	  <input type="checkbox"/>		
Unlock Line:	  <input type="checkbox"/>		
Call Restriction:	  <input type="checkbox"/>		
	<input type="text"/> Add [No prefixes defined] Remove		
CLI Substitute Activation:	  <input type="checkbox"/>		
CLI Substitute Number:	  <input type="text" value="--- Not Selected ---"/>		
<input type="button" value="Save"/>			

Similar fields in the window can be unlocked, edited and saved as above.